Tally Categories

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Purpose and when to use this record

Group recurring agency tally definitions into stable operational and reporting sections.

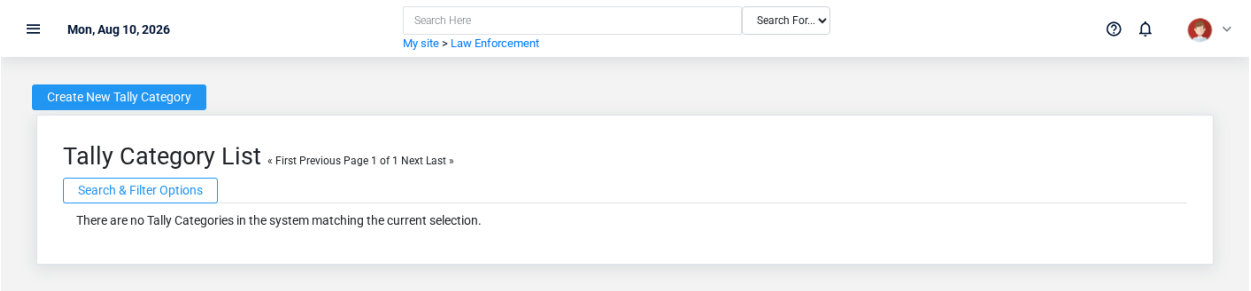
At a glance

- **Identify it by: Name**.
- **Why care:** Use the agency’s approved terminology and access policy. Preserve dates, responsible personnel, case links, and audit history because these records may support official reporting or custody review.

Before you begin

You need the Brisk permission for the action you are taking on tally categories. If a Create, Edit, or Delete control is absent, do not work around it with another user’s account; ask an administrator to review your role.

Find and review tally categories

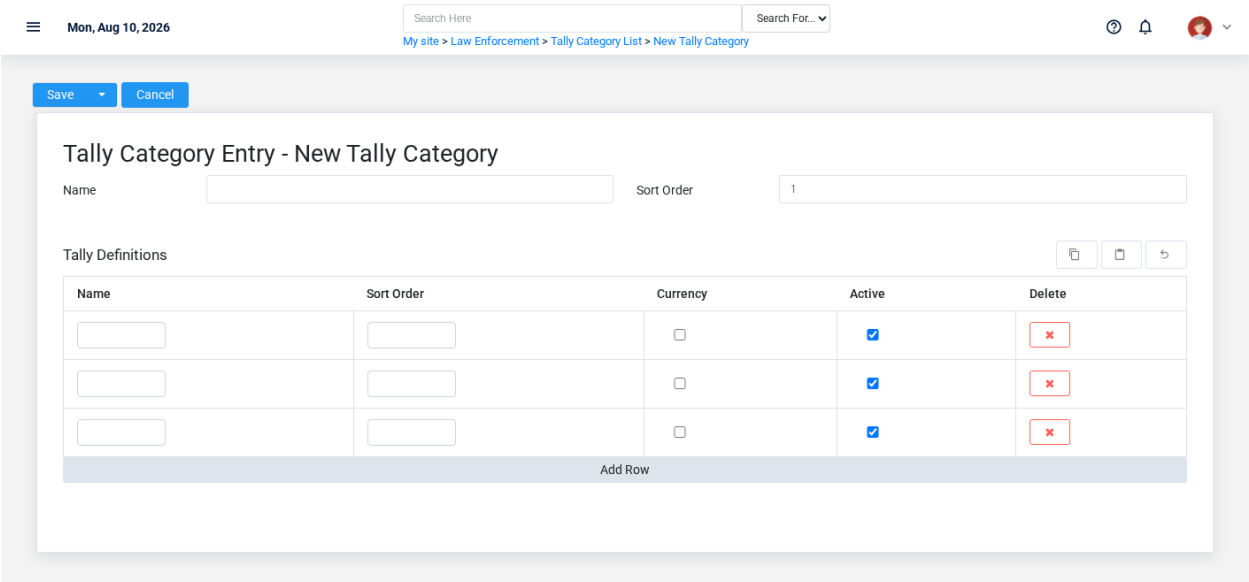


The Tally Categories list screen in the Brisk documentation demo.

Use the Tally Categories list to find the correct record before opening or changing it. Compare **Name**. Compare the full identifier rather than relying on a similar name.

Open the Tally Category whose **Name** match the task. If it is missing, clear the list filters and recheck the identifying information shown on the screen rather than creating a replacement immediately.

Create a Tally Category



The Tally Categories create screen in the Brisk documentation demo.

Create a Tally Category only when the existing choices do not represent the policy or classification you need. Near-duplicate setup values split reporting and make later selection harder.

1. Select the business context first.
2. Enter the required identifying and operational values: **Name**.
3. Review **Sort Order** against the source document or approved setup decision.
4. Save the Tally Category, then confirm **Name** on its detail page before continuing.

After saving: Open **Tally Definitions** and confirm the Tally Category appears with the intended label and availability. Keep the old value for historical records when changing it would split or relabel prior reporting.

Delete a Tally Category

Delete this Tally Category only if it is an unused duplicate or setup mistake. Once other records refer to it, preserve that history and make the value inactive when the screen provides that option.

Before confirming, check for related **Tally Definitions**. Brisk may refuse deletion when another record depends on this one; resolve the duplicate or use the supported correction workflow instead of breaking the trail.

On the confirmation page, verify **Name**. After confirmation, return to the Tally Categories list and make sure only the intended Tally Category was removed.

Review Tally Category details

Use the detail page as the shared record of what this Tally Category currently means. Verify **Name**, and **Sort Order** before relying on it for a decision.

Compare the Tally Category with its source document or approved setup request before deciding that it needs correction.

Next check: Open **Tally Definitions** and confirm the Tally Category appears with the intended label and availability. Keep the old value for historical records when changing it would split or relabel prior reporting.

Edit an existing Tally Category

Edit this Tally Category when the underlying policy or classification changed. First determine whether historical transactions should retain the old value; if so, deactivate the old choice and create a new one.

1. Open the detail page. Compare **Name** with the supporting document or approved request.
2. Recheck the identifying information shown on the screen. These values are most likely to change case history, custody, dispatch, official reporting, or audit review.
3. Save the change, return to the list, and confirm that the Tally Category now appears under the expected **Name**.

After the change: Open **Tally Definitions** and confirm the Tally Category appears with the intended label and availability. Keep the old value for historical records when changing it would split or relabel prior reporting.

Fields and business rules

Brisk stores 2 user-relevant fields for this Tally Category, including 0 linked-record selections and 0 controlled-choice fields. Create and edit screens may hide calculated or workflow-managed values from this full reference.

Field	Required	What it controls
Name	Yes	Sets the name of the category.

Field	Required	What it controls
Sort Order	No	Sets the order that this category appears on daily logs and reports.

What happens next

Open **Tally Definitions** and confirm the Tally Category appears with the intended label and availability. Keep the old value for historical records when changing it would split or relabel prior reporting.

Common mistakes and troubleshooting

- **The record will not save:** Recheck **Name** and any message beside the field. A required related record may also be inactive or unavailable to your role.
- **The values look right but the result is wrong:** Compare this Tally Category with the source document or approved setup decision, then check the downstream screen where it is used.

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